

2024 MMI Annual Conference

SPONSOR AND EXHIBITOR OPPORTUNITIES

October 15–17, 2024 • The Sheraton & Le Méridien Charlotte Hotel Complex • Charlotte, NC



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#MMIAnnualConference

[mminst.org](https://www.mminst.org)

BE PART OF THE ENERGY AND EXCITEMENT. JOIN US IN CHARLOTTE!

The 2024 MMI Annual Conference—the investment advisory industry’s most important gathering of the year—will take place in the beautiful Queen City of Charlotte, North Carolina. Don’t miss this one-of-a-kind opportunity to connect with the customers and prospects you value the most in one spot over three days.

Our 2023 event drew nearly 600 attendees and a robust roster of Sponsors and Exhibitors—and we’re setting the bar even higher for this year. Reserve your spot now to be part of the unique Annual Conference experience.



We are pleased to announce an exciting lineup of **Sponsor and Exhibitor opportunities**. Choose from:

- + Premium **Gold, Silver** and **Bronze** Sponsor packages that offer **maximum branding exposure** and extra benefits
- + **Exhibit Booth and Tabletop packages** that give your firm a visible presence in the bustling “**Solutions Center**” that is the hub of conference activity
- + **Limited Presenting Sponsor opportunities** for the Opening Reception and Night 2 Reception—both of which will create lasting memories for attendees
- + **À la Carte Sponsorship opportunities** to meet your specific needs and budget

Each package offers **high-profile exposure, enhanced event participation, and new ways to engage** with our audience of investment advisory business leaders and decision makers.

QUESTIONS?

Contact Joan Lensing at (646) 868-8518 or jlensing@mminst.org

2024 ANNUAL CONFERENCE AT-A-GLANCE

- + The **largest investment advisory event** of the year with expected attendance of more than **600 senior executives**
- + A **three-day event** with a **dynamic, high-impact experience**
- + **Dedicated subject matter tracks** to attract a **diverse audience**
- + Attendees from **leading asset manager, wealth manager, and solutions provider firms**
- + Updated “**Solutions Center**” with **enhanced Sponsor/Exhibitor experience and networking opportunities**
- + **Presenting Sponsor opportunities** available for both the **Opening Reception** and **Night 2 Reception**
- + Planned **on-demand playback access** to certain sessions to extend the audience
- + **Limited spots available** and expected to sell out early
- + Sponsors and Exhibitors receive **valuable exposure** before, during and after the event



CREATE HIGH-IMPACT BRAND AWARENESS AND BUILD RELATIONSHIPS

MMI Annual Conference Sponsor and Exhibitor Opportunities

Established in 1997, the **Money Management Institute (MMI)** is the industry association representing financial services firms that provide financial advice and investment advisory solutions to investors. Driven by our promise of increasing **connections, knowledge, and growth** for our members, MMI is dedicated to **fostering professional relationships, sharing experiences, and expanding the industry’s influence** through advocacy and education.

MMI’s conferences are one of the key ways we help advisory industry stakeholders to Connect, Know and Grow. **Senior executives from leading asset manager, wealth manager, and solutions provider firms** join

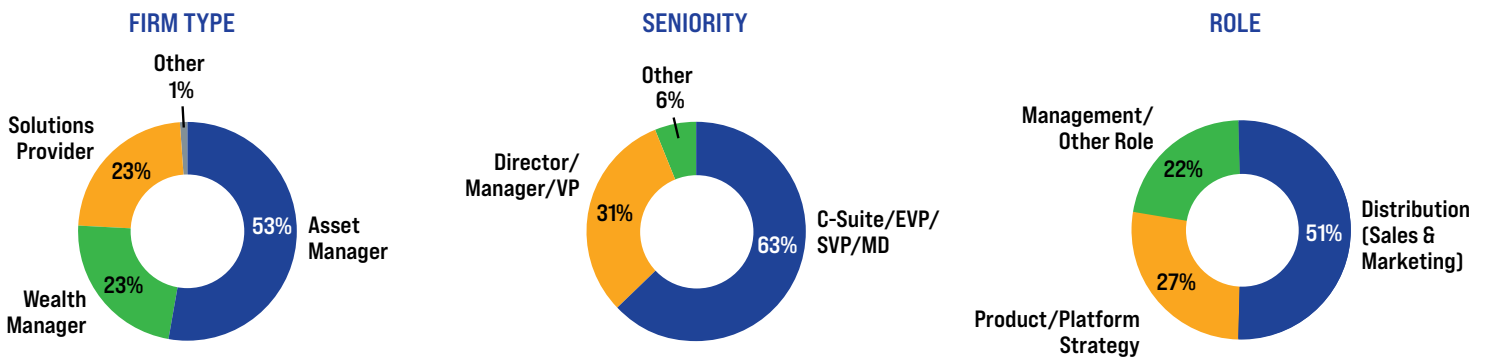
us at our events to **build relationships** with their industry peers and **gain insights** into strategies and tactics to help them grow their advisory solutions business.

Would your firm benefit from increased exposure with this audience?

MMI’s 2024 Annual Conference is expected to draw **over 600 senior business leaders** who are responsible for developing, managing and distributing investment advisory platforms and services. Our attendees are informed decision makers who drive purchase decisions.

ATTENDEE PROFILE*

(Based on 2023 Annual Conference)



*More than 570 representatives from over 172 distinct organizations attended the 2023 Annual Conference.

Among those attendees, more than 94% held titles of VP or higher, and 78% were distribution or product/platform leaders. We expect the profile of the 2024 Annual Conference attendees to be comparable.

MMI MEMBER FIRMS

MMI's 205+ member firms are focused on the investment advisory space. They comprise a diverse group of leading:

- + Wealth management firms and distributors
- + Asset managers
- + Wirehouses
- + Independent broker-dealers
- + Banks
- + RIA firms
- + Custodians
- + Technology and solutions provider firms
- + Industry consultants and research firms
- + Mutual fund and ETF providers
- + Alternative investment providers

WHO SHOULD SPONSOR OR EXHIBIT

For Sponsors and Exhibitors, the Annual Conference represents an exceptional opportunity to meet with investment advisory executives, gain strategic insights, and highlight your firm's products and services. Among the broad array of firms that choose to sponsor or exhibit are:

- + Technology and solutions providers
- + Wealthtech and fintech companies
- + Data information/management firms
- + Emerging asset managers
- + Robo advisors/digital advice providers
- + Industry media and publications
- + Platform sponsor firms
- + Turnkey asset management firms
- + Executive search firms
- + Industry consultants and research firms
- + Third-party marketing firms
- + Other industry associations



PREMIUM SPONSOR OPPORTUNITIES (Continued on next page)

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
Cost	\$25,000* \$28,000†	\$20,000* \$23,000†	\$15,000* \$18,000†	\$9,000* \$12,000†	\$9,000* \$12,000†	\$9,000* \$12,000†
Availability	3 available	4 available	6 available	2 available	SOLD	SOLD
Exhibit Booth	Single premium location	Single prime location	Choice of single booth or tabletop display			
Complimentary registrations	4	3	2			
Discounted registrations	10% off standard registration fee for additional registrations	10% off standard registration fee for additional registrations	10% off standard registration fee for additional registrations	25% off standard registration fee for one (1) registration	25% off standard registration fee for one (1) registration	25% off standard registration fee for one (1) registration
Recognition as sponsor of one (1) conference track	●					
Recognition as sponsor of one (1) networking luncheon	●					
Recognition as sponsor of one (1) networking breakfast		●				
Recognition as sponsor of one (1) refreshment & networking break			●			
Opportunity to open or close a keynote speaker				●		
Exclusive sponsor of conference Wifi					SOLD	
Exclusive opportunity to brand guest hotel key cards						SOLD

*MMI member price

†Non-member price

PREMIUM SPONSOR OPPORTUNITIES (Cont'd)

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
60-second video ad in general session walk-in loop	●	●				
Sponsor recognition and color logo featured in event signage and general session slides	●	●	●	●	●	●
Video ad compilation reel—full color ad	●	●	●			
One (1) company-supplied handout uploaded to event app or giveaway distributed	●	●	●	●	●	●
Event app—banner ad	Home page	Home page	Interior page			
Event app—listing	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	●	●	●			
Electronic list of attendees pre- and post-event*	●	●	●	●	●	●
Event landing page on MMI website	Logo	Logo	Logo	Logo	Logo	Logo
Event email communications	Logo	Logo	Logo	Logo	Logo	Logo
Recognition in event related LinkedIn posts	●	●	●	●	●	●
Opportunity to provide a content link for an upcoming issue of <i>MMInsight</i>	●					
Link to thought leadership piece or company website included in special post-event attendee email	●	●				

*Those who do not opt out of information sharing

EXHIBITOR OPPORTUNITIES: TWO OPTIONS TO MEET YOUR NEEDS

Two types of Exhibitor Opportunities are available. The quantity of each is limited and will be allocated on a first-come, first-served basis.

Booth Size	OPTION 1: EXHIBIT BOOTH (8'x10')	OPTION 2: EXHIBIT TABLETOP (6'x30")
Cost	\$10,000* / \$13,000†	\$7,000* / \$10,000†
Availability	Multiple	Multiple
Complimentary registrations	2	2
Exhibit Booth/Tabletop	8'x10' booth space with choice of: One (1) draped exhibit table with two (2) chairs or one (1) pedestal table with two (2) chairs**	6'x30" tabletop space with one (1) draped table and two (2) chairs**
ID Sign	●	●
Overnight security	●	●
Wastebasket	●	●
Event app—listing	●	●
Electronic list of attendees pre- and post-conference‡	●	●

*MMI member price

†Non-member price

‡Those who do not opt out of information sharing

**Additional furnishing packages available through Freeman, our exhibition services provider.

Both Exhibitor Opportunities Also Include:

- + Opening Reception for all attendees
- + All refreshment breaks and the Night 2 Cocktail Reception held in the Solutions Center
- + Description listing in conference mobile app



SPONSOR OPPORTUNITIES FOR THE OPENING RECEPTION

A NIGHT AT NASCAR

Tuesday, October 15 • 6:30pm – 9:00pm
NASCAR Hall of Fame

Opening Reception for All Attendees



Located in Uptown Charlotte, the NASCAR Hall of Fame is a high-tech venue designed to honor the history and heritage of NASCAR. Attendees will enjoy interactive displays and exhibits, local fare, unique beverage options, and a venue that is unlike any other.

Want your firm to stand out to attendees? Be one of the Presenting Sponsors for what's sure to be a memorable event.



Sponsorship	OPENING RECEPTION
Cost	\$20,000* / \$23,000†
Availability	Multiple
Complimentary registrations	1
Discounted registrations	10% off standard registration fee for two (2) registrations
Recognition	Recognition from the conference main stage
Reception branding	Prominent branding opportunities at the reception, including providing your custom napkins or coasters
Sponsor recognition and color logo featured in event signage and general sessions slides	●
Video ad compilation reel—full color ad	●
Event app—banner ad	Interior page
Event app—listing	Sponsor page
Event app—one (1) push notification to all attendees	●
Electronic list of attendees pre- and post-event‡	●
Event landing page on MMI website	Logo
Event email communications	Logo
Recognition in event-related LinkedIn posts	●

*MMI member price

†Non-member price

‡Those who do not opt out of information sharing

SPONSOR OPPORTUNITIES FOR THE NIGHT 2 RECEPTION

CHARLOTTE SOCIAL

Wednesday, October 16 • 5:30pm – 7:30pm
The Sheraton & Le Méridien Charlotte Hotel Complex

Night 2 Reception for All Attendees

The Solutions Center, our bustling exhibit hall, provides the perfect venue for attendees to mingle with industry colleagues in a relaxed setting while savoring authentic local cuisine and unique Charlotte experiences.

Grab the spotlight! Join us as a Presenting Sponsor for this special evening.



Sponsorship	NIGHT 2 RECEPTION
Cost	\$20,000* / \$23,000†
Availability	Multiple
Complimentary registrations	1
Discounted registrations	10% off standard registration fee for two (2) registrations
Recognition	Recognition from the conference main stage
Reception branding	Prominent branding opportunities at the reception, including providing your custom napkins or coasters
Sponsor recognition and color logo featured in event signage and general sessions slides	●
Video ad compilation reel—full color ad	●
Event app—banner ad	Interior page
Event app—listing	Sponsor page
Event app—one (1) push notification to all attendees	●
Electronic list of attendees pre- and post-event‡	●
Event landing page on MMI website	Logo
Event email communications	Logo
Recognition in event-related LinkedIn posts	●

*MMI member price

†Non-member price

‡Those who do not opt out of information sharing

À LA CARTE SPONSORSHIP OPPORTUNITIES

À la Carte Sponsorship Items for the Annual Conference are available at a variety of price points to help you gain **additional exposure and build extra brand awareness**. Inventory is limited and available sponsorships will be allocated on a first-come, first-served basis.



Notebook and Pen*

\$5,000

Add your logo to a notebook and pen, and we will distribute them to all attendees to carry and use throughout the conference.



Mobile App Interior Banner Ad

\$2,500

Call attention to your firm's products and services with one of the banner ads that appears in the conference mobile app.



Full Color Ad in Video Ad Compilation Reel

\$2,500

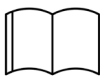
Catch the attention of attendees by placing your firm's ad in the compilation reel that plays between sessions.



High-Visibility Onsite Branding Opportunities

Starting at \$5,000

Take advantage of key onsite branding options, including customized window panels, column wraps, floor stickers, hand sanitizer stations, charging stations, restroom amenities, and more. Opportunities are available at a range of price points. Contact MMI for options and pricing.



Handout Uploaded to Mobile App or Giveaway Distributed to All Attendees*

\$2,500

Supply a company-branded handout or giveaway to be distributed to all attendees.



Mobile App Alert

\$2,500

Send a one-time alert to all conference attendees with a unique call to action.



*Item Supplied by Sponsor

Contact MMI at (646) 868-8500 or events@mminst.org for availability or to discuss ideas for other customized sponsorship opportunities.

ADDITIONAL SPONSOR OPPORTUNITIES

LET YOUR IMAGINATION RUN WILD!

Want to create a custom sponsorship opportunity that spotlights your firm while providing a memorable experience for attendees?

Please contact MMI at events@mminst.org or (646) 868-8500 to discuss additional opportunities.



2024 ANNUAL CONFERENCE PRELIMINARY SCHEDULE OF EVENTS

Tuesday, October 15

7:00AM – 10:30AM	Sponsor and Exhibitor Booth Setup
10:30AM – 11:00AM	Solutions Center Walkthrough <i>(Exhibit Booth or Tabletop Display must be completely set)</i>
11:30AM – 5:30PM	Solutions Center and Conference Registration Open
6:15PM – 7:30PM	Transportation or Walk to Opening Reception
6:30PM – 9:00PM	Offsite Opening Reception: A Night at NASCAR <i>NASCAR Hall of Fame</i>

Wednesday, October 16

7:30AM – 5:30PM	Solutions Center Open
5:30PM – 7:30PM	Night 2 Reception <i>Charlotte Social</i> The Sheraton & Le Méridien Charlotte Hotel Complex

Thursday, October 17

7:30AM – 11:00AM	Solutions Center Open
11:00AM – 1:00PM	Sponsor and Exhibitor Move-Out



PARTICIPATING FIRMS AT 2023 ANNUAL CONFERENCE

(Continued on next page)

AB (AllianceBernstein)

Advisor Group

Advisor360

Advisorpedia

Allspring Global Investments

American Century Investments

Ameriprise Financial Services

AMG Funds

Anchor Capital

Andes Wealth Technologies

Apollo Global Management

Archer

Aristotle Capital Management

Ashmore

AssetLink

AssetMark

Ategenos Capital

Axioma

Axxes Capital

Bahl & Gaynor

Baillie Gifford International

Bank of America Merrill Lynch

Belle Haven Investments

BlackRock

Blackstone

Bloomberg

Blue Owl Capital

Bluerock Capital Markets

BNY Mellon

BondBloxx

Brandes Investment Partners

Broadridge Financial Solutions

Brown Advisory

CAIS

Cambridge Investment Research

CapIntel

Capital Group

Cerulli Associates

Cetera Financial Group

CGI

Chandler Asset Management

Charles River Development

Charles Schwab

Clark Capital Management Group

Cohen & Steers

Columbia Threadneedle

Confluence InvestmentManagement

Congress Asset Management

Diamond Hill Capital Management

Dimensional Fund Advisors

Door

Eaton Vance

Edward Jones

Envestnet

Ernst & Young

Federated Hermes

Fidelity Investments

Financial Services Institute

First Eagle Investments

FLX Networks

Flyer Financial Technologies

ForwardLane

Foxfield

Franklin Templeton Investments

FS Investments

FundFire

FUSE Research Network

Glenmede Investment Management

Goldman Sachs

GQG Partners

Halo Investing

Hamilton Lane

Harbor Capital Advisors

Hey DAN

Hilltop Securities

Hilton Capital Management

Horizon Investments

iCapital Network

Impax Asset Management

IMTC

Income Discovery

Insured Retirement Institute

Invesco

InvestCloud

Investments & Wealth Institute

ISS Market Intelligence

Jackson

Jacobs & Company

Janus Henderson

Javelin Strategy

John Hancock Investment Management

JP Morgan

Kathy Freeman Company

Lazard Asset Management

Lincoln Financial Advisors

Lord Abbett

LPL Financial Services

LSEG

Lumiant

PARTICIPATING FIRMS AT 2023 ANNUAL CONFERENCE *(Cont'd)*

Macquarie Asset Management	Raymond James	Wilshire
Madison Investments	RBC Wealth Management	WisdomTree
Marc Butler Consulting	RealBlocks	XA Investments
MassMutual	Russell Investments	Xtrackers by DWS
Meta	S&P Dow Jones Indices	YCharts
MFS Investment Management	Sage Advisory Services	
Momentum Independent Network	SalesPage	
Mondrian Investment Partners	Segall Bryant & Hamill	
Money-Media	Sierra Mutual Funds & Ocean Park Asset Management	
Moody's Analytics	SMARtX Advisory Solutions	
Morgan Stanley Wealth Management	SS&C Technologies	
Morningstar	State Street Global Advisors	
MSCI	Stifel, Nicolaus & Company	
Mudrick Capital Management	Symetra	
MyVest	Syntax	
Natixis Investment Management	T. Rowe Price	
Neuberger Berman	TD Asset Management	
New York Life Investment Management	Thornburg Investment Management	
NewRetirement	TIAA	
Next Chapter	Todd Asset Management	
Nikko Global Wrap	Toews Asset Management	
Nomura Research Institute America	TortoiseEcofin	
Nuveen Investments	Touchstone Investments	
Orion	Truist	
Pacific Life Insurance Company	UBS	
Perpetual Investments	Vanguard	
PG Wholesaling	Vestmark	
PGIM	Voya Investment Management	
PIMCO	Wall Street Journal/Barron's Group	
Principal Asset Management	Wells Fargo	
Proteus	Westwood Holdings Group	
PwC	William Blair & Company	
Ramirez Asset Management		

SPONSORSHIP COMMITMENT FORM

Sponsor or Exhibitor Information

Contact Name _____

Address _____

Email _____

Firm Name _____

City _____ State _____ Zip _____

Phone _____

PREMIUM SPONSOR OPPORTUNITIES		
	MMI MEMBER	NON-MEMBER
GOLD SPONSOR	\$25,000	\$28,000
SILVER SPONSOR	\$20,000	\$23,000
BRONZE SPONSOR	\$15,000	\$18,000
WIFI SPONSOR	SOLD	SOLD
BRANDED KEY CARD SPONSOR	SOLD	SOLD
EXHIBITOR OPPORTUNITIES		
EXHIBIT BOOTH (8'x10')	\$10,000	\$13,000
EXHIBIT TABLETOP (6'x30")	\$7,000	\$10,000
OPENING RECEPTION SPONSOR OPPORTUNITIES		
PRESENTING SPONSOR	\$20,000	\$23,000
NIGHT 2 RECEPTION SPONSOR OPPORTUNITIES		
PRESENTING SPONSOR	\$20,000	\$23,000
À LA CARTE SPONSOR OPPORTUNITIES		
NOTEBOOK AND PEN		\$5,000
VIDEO AD COMPILATION REEL—FULL COLOR AD		\$2,500
HANDOUT UPLOADED TO MOBILE APP OR GIVEAWAY DISTRIBUTED TO ALL ATTENDEES*		\$2,500
MOBILE APP ALERT		\$2,500
MOBILE APP INTERIOR BANNER AD		\$2,500
HIGH-VISIBILITY ONSITE BRANDING OPPORTUNITIES		TBD
OTHER _____		TBD

*Item Supplied by Sponsor

TOTAL OF ALL SELECTED \$ _____

THANK YOU FOR YOUR SPONSORSHIP!

Payment Information*

Credit Card # _____

CVV _____ Exp. Date _____

Name on Card _____

Billing Address _____

City _____ State _____ Zip _____

***Payment by credit card is preferred.** If you are not able to pay by credit card, please check the box below and MMI will send you an invoice to be paid by check or by electronic funds transfer.

 Invoice Required

Authorized Signatures

This signed commitment form is considered final and binding and can only be amended by mutual agreement of both parties in writing.

Purchasing Firm _____

Money Management Institute _____

Send Commitment Form Via

Email

jlensing@mminst.org

Mail

Money Management Institute
Attn: Joan Lensing
1410 Broadway, Suite 2601
New York, NY 10018

CANCELLATION POLICY

MMI reserves the right to approve/decline all Sponsor and Exhibitor applications. Sponsor and Exhibitor packages are considered final and binding at the time this signed Commitment Form is received and approved by MMI. No refunds will be given for cancellations.